



ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

1 Raffi Leon George (Estate) Case No. 04CEPR01552
Attorney Simonian, Jeffrey D (for Leon Y. George and Armen L. George – Administrators)
Probate Status Hearing Re: Failure to File the Inventory and Appraisal and for
Failure to File a First Account or Petition for Final Distribution

| | | |
|----------------------------|---|---|
| | LEON Y. GEORGE , father, and ARMEN L. GEORGE , brother, were appointed as Co-Administrators with Full IAEA without bond and Letters issued on 1-25-05. | NEEDS/PROBLEMS/COMMENTS: Minute Order of 06/15/2015: Additional time is needed for the processing of the tax returns so that the final tax liabilities of the decedent can be determined and to allow for resolution of the claim of the Franchise Tax Board. Mr. Simonian requests six weeks. |
| | | |
| Cont. from: 061515, 071615 | Inventory and Appraisal Partial No. 1 was filed on 01/09/2015 indicating real property valued at \$160,000.00 and personal property valued at \$1,500.00. | 1. Need First Account or Petition for Final Distribution or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties. |
| Aff.Sub.Wit. | | |
| Verified | | |
| Inventory | Final Inventory and Appraisal Partial No. 2 was filed 04/20/2015 indicating personal property valued at \$139,728.83 | |
| PTC | | |
| Not.Cred. | | |
| Notice of Hrg | No accounting or petition for final distribution was ever filed pursuant to Probate Code §12200. | |
| Aff.Mail | | |
| Aff.Pub. | | |
| Sp.Ntc. | Minute Order of 04/20/2015 set this status hearing. Minute Order states: Mr. Simonian represents that he has the completed Final Inventory and Appraisal with him and he will file it directly after this proceeding. Mr. George requests 45 days; the OSC is vacated. If the petition is filed at least two court days prior, then no appearance is necessary on 06/15/2015. | |
| Pers.Serv. | | |
| Conf. Screen | Status Report filed 07/10/2015 for previous status hearing states Co-Administrator, Leon Y George died on 04/10/2015. Armen L. George continues as the surviving Co-Administrator of the Decedent's estate. An Inventory and Appraisal – Partial No. 1 listing the real property and personal effects of the Decedent has been completed and returned by the Probate Referee and has been filed with this Court. The Inventory and Appraisal – Partial No. 2 (Final) listing the securities held by the Decedent at date of death has been completed and returned by the Probate Referee and has been filed with this Court. The decedent's personal income tax returns for the calendar year ending 2004 have been completed and filed. | |
| Letters | | |
| Duties/Supp | | |
| Objections | | |
| Video Receipt | | |
| CI Report | | |
| 9202 | | |
| Order | | |
| Aff. Posting | | Reviewed by: LV |
| Status Rpt | | Reviewed on: 08/18/2015 |
| UCCJEA | | Updates: |
| Citation | | Recommendation: |
| FTB Notice | | File 1 - George |

Please see additional page

Continued from previous page: The Franchise Tax Board and Internal Revenue Service are still processing the returns and are at the present time unable to provide information to determine the tax liabilities, penalties and interest associated with the Decedent's final personal income tax returns which is necessary for filing the Petition for Final Distribution. Attached are copies of correspondence to the Internal Revenue Service and the Franchise Tax Board requesting information concerning the expected processing times for the returns and when it can be expected that a determination of the outstanding tax liabilities, penalties and interest owed by the Decedent's estate associated with the Decedent's final personal income tax returns can be made. No communications from either the Internal Revenue Service or the Franchise Tax Board have been received concerning Attorney Simonian's request.

Additional time is needed to close the Decedent's estate to allow for the processing of these returns so that the final tax liabilities of the Decedent can be determined and to allow for resolution of the claim of the Franchise Tax Board. It is anticipated that these issues can be resolved and the Petition for Final Distribution filed within the next 6 weeks.

Petitioner Salvador Torres (Pro Per Guardian)

Petition for Termination of Guardianship

| | | | | |
|------------|---------------|---|---|---|
| | | SALVADOR TORRES , paternal uncle and Guardian appointed on 12/4/2006, is Petitioner. ~Please see Petition for details~ Court Investigator's Report was filed on 8/17/. | NEEDS/PROBLEMS/COMMENTS: Note: This <i>Petition for Termination</i> pertains to Mariah Torres only . Siblings Monica Torres and Manuel Torres are over the age of 18 and are no longer under guardianship. 1. Pursuant to Probate Code §§1601, 1460(a) and (b), and 1510(c), need <i>Notice of Hearing</i> and proof of service by mail of the <i>Notice of Hearing</i> with a copy of the <i>Petition for Termination of Guardianship</i> , or <i>Consent to Termination and Waiver of Notice</i> , or a <i>Declaration of Due Diligence</i> , for: <ul style="list-style-type: none"> • Priscilla Ramirez, mother, if Court does not find diligence per Declaration filed 6/24/2015. • Manuel Torrez, father, if Court does not find diligence per Declaration filed 6/24/2015. • Mariah N. Torres, ward; • Salvador Torres, II, paternal grandfather; • Amelia Torres, paternal grandmother; • Ruben Ramirez, maternal grandmother; • Eva Ramirez, maternal grandmother; • Monica Torres, sibling (age 21); • Manuel Torres, sibling (age 19). | |
| Cont. from | | | | |
| | Aff.Sub.Wit. | | | |
| ✓ | Verified | | | |
| | Inventory | | | |
| | PTC | | | |
| | Not.Cred. | | | |
| | Notice of Hrg | | | X |
| | Aff.Mail | | | X |
| | Aff.Pub. | | | |
| | Sp.Ntc. | | | |
| | Pers.Serv. | | | |
| | Conf. Screen | | | |
| | Letters | | | |
| | Duties/Supp | | | |
| | Objections | | | |
| | Video Receipt | | | |
| ✓ | CI Report | | | |
| | 9202 | | | |
| ✓ | Order | | | |
| | Aff. Posting | | | |
| | Status Rpt | | | |
| | UCCJEA | | | |
| | Citation | | | |
| | FTB Notice | | | |
| | | | Reviewed by: LEG | |
| | | | Reviewed on: 8/18/15 | |
| | | | Updates: | |
| | | | Recommendation: | |
| | | | File 2 – Torres | |

Probate Status Hearing Re: Failure to File First Account or Petition for Final Distribution

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|---|--|--|
| DOD: 09/05/06 | ELIZABETH FELIX , daughter, was appointed Administrator with full IAEA and without bond on 03/20/07. Letters of Administration were issued on 03/21/07. | NEEDS/PROBLEMS/COMMENTS: <u>CONTINUED FROM 01/12/15</u> 1. Need Account/Report on Waiver of Account and Petition for Final Distribution and/or current verified status report. |
| Cont. from 090613 101113, 101714, 111714, 011215 | Final Inventory & Appraisal filed 04/13/07- \$160,000.00 | |
| Aff.Sub.Wit. | Notice of Status Hearing filed 07/17/13 set this matter for status on 09/06/13. | Reviewed by: JF Reviewed on: 08/18/15 Updates: Recommendation: File 3 – Estrada |
| Verified | Status Report filed 08/14/13 states: The only asset of the estate was real property located at 1924 S. Teilman, Fresno. There were no funds in the estate for expenses of administration; costs to date have been advanced by the Administrator's attorney. The heirs had no funds to pay the annual property taxes, upkeep or maintenance on the real property. The property was sold by the County of Fresno in March 2013 for non-payment of property taxes. The excess sale proceeds were \$32,379.78. A claim for excess proceeds was sent to the Fresno County Tax Collector on 06/05/13. It is unknown when the proceeds will be received by the estate per the tax collector's office. The Department of Health Care Services has liens for Medi-Cal advances for the decedent and her predeceased spouse against the estate in the amount of \$69,827.33. After payment of attorney's fees, costs of administration, and statutory commission, the balance of the excess sale proceeds will be paid to the Department of Health Care Services. Upon receipt of the funds from the County of Fresno, the final accounting and petition for final distribution will be prepared and filed. Status Report filed 12/01/14 states: The estate has not received the funds from the sale of real property by the Fresno County Tax Collector. The funds have not been released by the Fresno County Supervisors. Letter received from Vicki Crow (Tax Collector of Fresno) estimates that the excess proceeds distribution for the 2013 Tax Sale will not be presented to the Fresno County Board of Supervisors until August 2015. | |
| Inventory | | |
| PTC | | |
| Not.Cred. | | |
| Notice of Hrg | | |
| Aff.Mail | | |
| Aff.Pub. | | |
| Sp.Ntc. | | |
| Pers.Serv. | | |
| Conf. Screen | | |
| Letters | | |
| Duties/Supp | | |
| Objections | | |
| Video Receipt | | |
| CI Report | | |
| 9202 | | |
| Order | | |
| Aff. Posting | | |
| Status Rpt | | |
| UCCJEA | | |
| Citation | | |
| FTB Notice | | |

5A**Wanda H. Bingham (CONS/PE)****Case No. 11CEPR00949**

Attorney

Roberts, David A. (Petitioner – Attorney for Former Conservator)

Attorney

Janisse, Ryan M. (for Randy Grace – Current Conservator – Objector)

Attorney

Boyett, Deborah (Court appointed attorney for Conservatee)

Petition for Order Awarding Attorneys Fees

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|---|---------------|---|---|
| See petition, objections for details. | | | NEEDS/PROBLEMS/COMMENTS: <u>Note:</u> Nothing further has been filed in connection with this petition as of 8/18/15. <u>Note:</u> Page B is the Former Conservator's Third Amended First Account filed 6/10/15. <u>Note:</u> Deborah Boyett, Court appointed attorney for Conservatee, filed Notice of Non-Opposition on 5/29/15. 1. Petitioner requests compensation from the conservatorship estate for services in connection with the conservatee's trust. The Court may require clarification or payment from the trust rather than the conservatorship estate. |
| Cont. from 050515, 060215, 061215, 072015 | | | |
| | Aff.Sub.Wit. | | |
| ✓ | Verified | | |
| | Inventory | | |
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| | Not.Cred. | | |
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| | Conf. Screen | | |
| | Letters | | |
| | Duties/Supp | | |
| ✓ | Objections | | |
| | Video Receipt | | |
| | CI Report | | |
| | 9202 | | |
| ✓ | Order | | |
| | Aff. Posting | | |
| | Status Rpt | | |
| | UCCJEA | | |
| | Citation | | |
| | FTB Notice | | |
| Reviewed by: skc | | | |
| Reviewed on: 8/18/15 | | | |
| Updates: | | | |
| Recommendation: | | | |
| File 5A - Bingham | | | |

5A

Third Amended First and Final Account and Report of Conservator and Petition for Allowance of Compensation to Conservator and Attorneys' Fees and Costs

| | | | |
|-------------------------------------|----------------------|---|--|
| | | JOAN ST. LOUIS , Former Conservator with bond of \$50,000.00, is Petitioner. | NEEDS/PROBLEMS/COMMENTS: <u>Note:</u> Objection was filed 7/16/15 by Randy Grace, current conservator and Co-Trustee, with Joinder to Objection filed by Wells Fargo Bank, NA, Co-Trustee. <u>Note:</u> Third Errata filed 8/3/15 provides revised summary and schedules. Objections to the Third Errata were filed 8/17/15. <u>SEE ADDITIONAL PAGES</u> Reviewed by: skc Reviewed on: 8/18/15 Updates: Recommendation: File 5B – Bingham |
| | | Account period: 11/15/12 – 12/31/14 Accounting*: \$557,542.00 \$556,173.59 Beginning POH: \$342,061.57 Ending POH: \$133,915.94 (\$118,006.86 cash plus personal property valued at \$15,909.08.) Ending POH*: \$378,789.91 (\$118,006.86 cash plus non-cash assets including an IRA, household items, a vehicle, and certain jewelry) *Per Third Errata filed 8/3/15 | |
| Cont. from 072015 | | Petitioner states all conservatorship assets were turned over to Successor Conservator Randy Grace on 1/2/15. Conservator: \$29,303.76 (\$17,665.66, plus mileage of \$3,447.10 and reimbursement of \$8,191.00 as set forth in the petition for various grocery and other cash value cards) Attorney: \$16,597.50 (\$15,277.50 plus additional costs of \$1,320.00 for estimated time in connection with the hearings) Petitioner's attorney has filed a petition for attorney's fees requesting \$50,120.00 plus costs of \$2,097.00. By way of this petition, Mr. Roberts is also requesting \$15,277.50 for the period from 2/21/15 through 6/10/15, including an additional four hours in preparing for and attending the hearings, etc. Costs: \$435.00 plus \$60.00 (for filing this petition plus an ex parte filing) See also declarations of David Roberts and Joan St. Louis. Petitioner prays for an order an judgment as follows: <ol style="list-style-type: none"> Settling and allowing the Third Amended First Account and Report; Approving and confirming the acts of Petitioner as Conservator of the Person and Estate of Wanda H. Bingham; Allowing the sum of \$17,665.00 to be paid to Petitioner from the Survivor's Trust as compensation for her services rendered to the Conservatorship and \$3,447.10 from the Survivor's Trust for mileage reimbursement to Joan St. Louis; Allowing the sum of \$16,597.50 to be paid to Lang, Richert & Patch from the Survivor's Trust for legal services rendered from 2/21/15 through 6/10/15 (and post filing fees); Allowing the sum of \$495.00 to be paid to Lang, Richert & Patch from the Survivor's Trust as reimbursement of costs advanced to the conservatorship estate during this period. | |
| <input type="checkbox"/> | Aff.Sub.Wit. | | |
| <input checked="" type="checkbox"/> | Verified | | |
| <input type="checkbox"/> | Inventory | | |
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| <input checked="" type="checkbox"/> | Notice of Hrg | | |
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| <input type="checkbox"/> | Letters | | |
| <input type="checkbox"/> | Duties/Supp | | |
| <input checked="" type="checkbox"/> | Objections | | |
| <input type="checkbox"/> | Video Receipt | | |
| <input type="checkbox"/> | CI Report | | |
| <input checked="" type="checkbox"/> | 2620(c) | | |
| <input checked="" type="checkbox"/> | Order | | |
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| <input type="checkbox"/> | Citation | | |
| <input type="checkbox"/> | FTB Notice | | |

Page 2 - NEEDS/PROBLEMS/COMMENTS (Updated):

1. **Third Errata provides complete amended summary and schedules, with brief explanation in accompanying declaration. Upon cursory review, it appears that the Ending POH figure for non-cash assets is inconsistent with the accompanying schedule. Therefore, it appears the account does not balance. Further, it does not appear appropriate to include the difference between the carry value and market value of an asset that has not been sold as a credit/loss. There may be additional issues as noted in the Objection. Examiner has not reviewed in depth due to the initial appearance that the account does not balance.**

Objection filed 7/16/15 details various additional deficiencies including use of incorrect/inconsistent values. See Objections for specifics. Objection also objects to compensation requested by the conservator and the attorney.

Objector notes discrepancy between alleged services and Right At Home records. Right at Home is the company providing in-home care, and they maintain daily logs regarding the conservatee's care, meals, activities, visitors, phone calls, etc. Objector cross-referenced the dates Ms. St. Louis claims she visited and for which she requests compensation. The Right At Home logs do not support all of Ms. St. Louis' purported services. Objector extends Ms. St. Louis the benefit of the doubt on dates that are off by a day, but provides numerous examples of other inconsistencies, including days when visits were planned but cancelled, or claimed, but not corroborated.

Re attorney fees: Objector states that while Mr. Roberts expended significant time in preparation of the accounting, Objector contends this was because of inexperience, and Mr. Roberts cannot justify charging the conservatorship estate to educate himself and his staff about conservatorship accountings. Despite four attempts, Mr. Roberts has yet to file an accounting that complies with the code. Put simply, the fees sought have not achieved any results but to cost the conservatorship estate money. With each attempt, the court appointed attorney for the Conservatee, the successor conservator and his counsel, and the co-trustees of the trust have had to review and object, which further expends the conservatee's assets. The Conservatee has not received any benefit by the inability of Mr. Roberts to submit a proper accounting.

Objector requests:

1. **That Ms. St. Louis' request to allow and settle her account be denied;**
2. **That Ms. St. Louis' request to approve her acts as conservator be denied;**
3. **That Ms. St. Louis' request for compensation and mileage be denied or reduced;**
4. **That Ms. St. Louis' request to allow her attorney compensation be denied or reduced.**

Note: See Page 3 re Objection to Third Errata filed 8/17/15.

SEE ADDITIONAL PAGES

Page 3

Objection to Third Errata filed 8/17/15 details multiple issues with the revised schedules provided and states at this juncture, it is clear that Ms. St. Louis does not understand probate accounting and Objector has little confidence that this can be cured. The conservatorship estate cannot finance this education. Objector has objected to both Mr. Roberts' and Ms. St. Louis' requests for fees. No effort is made to address those objections in the Third Errata. Objector incorporates those objections herein and submits the failure of the parties to address the objections reflects their inability to explain the issues previously raised by Objector. Objector is prepared to submit the issue of fees on the existing pleadings as having an evidentiary hearing on the issue is only going to further diminish Mrs. Bingham's assets. In the interest of stopping the bleeding, Objector proposes that the accounting be denied and that all fees also be denied. Objector submits there should be a surcharge against Ms. St. Louis' and/or Mr. Roberts' fees to offset the fees incurred by the other attorneys involved in this matter who are being paid by Mrs. Bingham to deal with this persistent incompetence.

Provided the Court is willing to disallow all compensation in connection with preparation of the accounting, Objector proposes that he prepare an accounting covering Ms. St. Louis' time as conservator through his first year as conservator. Assuming no breaches are concealed in what has been submitted to the court, it should be easy (and inexpensive compared to the approx. \$25,000.00 Mr. Roberts seeks for his work in this regard) to present the court with an appropriate accounting.'

If the Court makes this order, Objector requests that Ms. St. Louis be ordered to turn over all source documents pertaining to the conservatorship assets within 15 days.

Objector requests:

1. That the accounting be denied;
2. The acts of Ms. St. Louis as conservator not be approved;
3. All compensation for Ms. St. Louis be denied or in the alternative a surcharge for such amount be ordered by the court;
4. All compensation Mr. Roberts be denied;
5. Objector Randy Grace be ordered to prepare an accounting on behalf of Ms. St. Louis in accordance with the Probate Code;
6. For such other orders as the Court deems just and proper.

Attorney **Boyajian, Thomas M. (for Conservator Irene V. Santos)**

Probate Status Hearing Re: Filing of the Final Account of the Conservatorship

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|---|----------------------|---|---|-------------------------------------|
| DOD: 11/8/2014 | | <p>IRENE V. SANTOS, daughter, was appointed Conservator of the Person and Estate on 11/8/2012 with bond set at \$123,895.00.</p> <p><i>Orders Regarding First Account, Approval of Sale of Depreciating Property, Approval and Allowance for Conservator's and Attorney's Compensation filed 2/26/2015</i> set this status hearing on 8/24/2015 for the filing of the final account of the Conservatorship.</p> | <p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need final account of the Conservatorship estate, or a verified status report and proof of service of notice of the status hearing with a copy of the status report to all interested parties pursuant to Local Rule 7.5(B).</p> | |
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| Cont. from | | | | |
| <input type="checkbox"/> | Aff.Sub.Wit. | | | <input type="checkbox"/> |
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| <input type="checkbox"/> | Not.Cred. | | | <input type="checkbox"/> |
| <input type="checkbox"/> | Notice of Hrg | | | <input type="checkbox"/> |
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| <input type="checkbox"/> | Conf. Screen | | | <input type="checkbox"/> |
| <input type="checkbox"/> | Letters | | | <input type="checkbox"/> |
| <input type="checkbox"/> | Duties/Supp | | | <input type="checkbox"/> |
| <input type="checkbox"/> | Objections | | | <input type="checkbox"/> |
| <input type="checkbox"/> | Video Receipt | | | <input type="checkbox"/> |
| <input type="checkbox"/> | CI Report | | | <input type="checkbox"/> |
| <input type="checkbox"/> | 9202 | | | <input type="checkbox"/> |
| <input type="checkbox"/> | Order | | | <input type="checkbox"/> |
| <input type="checkbox"/> | Aff. Posting | | | <input type="checkbox"/> |
| <input type="checkbox"/> | Status Rpt | | | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> | UCCJEA | <input type="checkbox"/> | | |
| <input type="checkbox"/> | Citation | <input type="checkbox"/> | | |
| <input type="checkbox"/> | FTB Notice | <input type="checkbox"/> | | |
| <p>Reviewed by: LEG</p> <p>Reviewed on: 8/18/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 7 – Murillo</p> | | | | |

Petitioner

Real, Cassandra A. (pro per – non-relative)

Petitioner

Corrales, Tony (pro per – brother)

Petition for Appointment of Guardian of the Person

| | | | | | |
|---------------------------|---------------|---|---|--|--|
| Age: 16 | | TEMPORARY EXPIRES 08/24/15 | | NEEDS/PROBLEMS/COMMENTS: | |
| | | TONY CORRALES , brother, and CASSANDRA REAL , non-relative (brother's girlfriend), are Petitioners. | | CONTINUED FROM 07/13/15 | |
| | | DOLORES PEREZ , maternal aunt, was appointed guardian on 11/01/12 – personally served on 05/21/15 | | Note: Letter from Dolores Perez (current guardian) attached to petition supports Petitioner's petition to become successor guardians. | |
| Cont. from 060815, 071315 | | | | | |
| | Aff.Sub.Wit. | | | | |
| ✓ | Verified | | | | |
| | Inventory | | | | |
| | PTC | | | | |
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| | Pers.Serv. | | X | | |
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| | Status Rpt | | | | |
| ✓ | UCCJEA | | | | |
| | Citation | | | | |
| | FTB Notice | | | | |

TONY CORRALES, brother, and **CASSANDRA REAL**, non-relative (brother's girlfriend), are Petitioners.

DOLORES PEREZ, maternal aunt, was appointed guardian on 11/01/12 – personally served on 05/21/15

Father: **PEDRO GARCIA** - deceased

Mother: **RUBY ZERMENO** – Consent & Waiver of Notice filed 08/10/15

Paternal grandfather: EMILIANO GARCIA-GUZMAN – Declaration of Due Diligence filed 08/10/15

Paternal grandmother: TERESA GARCIA-GUZMAN – Declaration of Due Diligence filed 08/10/15

Maternal grandfather: RUBEN CORRALES – deceased

Maternal grandmother: YVONNE RIOS – Consent & Waiver of Notice filed 08/10/15

Petitioner states that the current guardian's health is bad and she can't care for Martin anymore. Guardianship is needed for medical care and school.

Court Investigator Julie Negrete filed a report on 07/06/15.

NEEDS/PROBLEMS/COMMENTS:

CONTINUED FROM 07/13/15

Note: Letter from Dolores Perez (current guardian) attached to petition supports Petitioner's petition to become successor guardians.

1. Need proof of service at least 15 days before the hearing of Notice of Hearing with a copy of the Petition for Appointment of Guardian of the Person or Consent & Waiver of Notice or Declaration of Due Diligence for:
 - a. Martin Garcia (minor) – personal service; Proof of Service filed 08/10/15 states that Martin was served with the Notice of Hearing and a letter from Dolores, need proof of service of a copy of the Petition for Guardianship
 - b. Paternal grandparents – service by mail ok; unless diligence is found. Declaration of Due Diligence filed 08/20/15 states that the address or whereabouts of the paternal grandparents is unknown.

Reviewed by: JF

Reviewed on: 08/18/15

Updates:

Recommendation:

File 8A - Garcia

| | | |
|--|---|---|
| Age: 16 | CASSANDRA REAL , non-relative (brother's girlfriend), is Petitioner. | NEEDS/PROBLEMS/COMMENTS: CONTINUED FROM 07/13/15 Minute Order from 07/13/15 states: Examiner notes provided in open court; the Court Investigator needs additional time to complete the investigation. Due to the resignation of Dolores Perez on 04/20/15, the Court appoints Cassandra Real and Tony Corrales as Temporary Guardians; Letters to issue forthwith. 1. Need proof of service by mail at least 15 days before the hearing of Notice of Hearing with a copy of the Petition for Termination of Guardianship <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for: a. Martin Garcia (minor) – personal service; Proof of Service filed 08/10/15 states that Martin was served with the Notice of Hearing and a letter from Dolores, need proof of service of a copy of the Petition for Termination of Guardianship b. Paternal grandparents – service by mail ok; unless diligence is found. Declaration of Due Diligence filed 08/20/15 states that the address or whereabouts of the paternal grandparents is unknown. |
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| | | |
| Cont. from 071315 | DOLORES PEREZ , maternal aunt, was appointed guardian on 11/01/12. Consent & Waiver of Notice filed 08/10/15 | |
| <input type="checkbox"/> Aff.Sub.Wit. | Father: PEDRO GARCIA - deceased | |
| <input checked="" type="checkbox"/> Verified | Mother: RUBY ZERMENO – Consent & Waiver of Notice filed 08/10/15 | |
| <input type="checkbox"/> Inventory | Paternal grandfather: EMILIANO GARCIA-GUZMAN – Declaration of Due Diligence filed 08/10/15 | |
| <input type="checkbox"/> PTC | Paternal grandmother: TERESA GARCIA-GUZMAN – Declaration of Due Diligence filed 08/10/15 | |
| <input type="checkbox"/> Not.Cred. | Maternal grandfather: RUBEN CORRALES – deceased | |
| <input checked="" type="checkbox"/> Notice of Hrg | Maternal grandmother: YVONNE RIOS | |
| <input type="checkbox"/> Aff.Mail x | Sibling: TONY CORRALES | |
| <input type="checkbox"/> Aff.Pub. | Petitioner states that the current guardian's health is bad and she can't care for Martin anymore. | |
| <input type="checkbox"/> Sp.Ntc. | Court Investigator Julie Negrete filed a report on 07/06/15. | |
| <input type="checkbox"/> Pers.Serv. x | | |
| <input type="checkbox"/> Conf. Screen | | |
| <input type="checkbox"/> Letters | | |
| <input type="checkbox"/> Duties/Supp | | |
| <input type="checkbox"/> Objections | | |
| <input type="checkbox"/> Video Receipt | | |
| <input checked="" type="checkbox"/> CI Report | | |
| <input type="checkbox"/> 9202 | | |
| <input checked="" type="checkbox"/> Order | | |
| <input type="checkbox"/> Aff. Posting | | |
| <input type="checkbox"/> Status Rpt | | |
| <input type="checkbox"/> UCCJEA | | |
| <input type="checkbox"/> Citation | | |
| <input type="checkbox"/> FTB Notice | | |

| |
|------------------------------|
| Reviewed by: JF |
| Reviewed on: 08/18/15 |
| Updates: |
| Recommendation: |
| File 8B - Garcia |

| | | | | | |
|--------------------------|---------------|---|--|--|--|
| Age: 62 | | TOM AVEDESAN and LOUISE AVEDESAN, Co-Trustees, are petitioners. | | NEEDS/PROBLEMS/COMMENTS: | |
| | | | | The following issues remain: | |
| | | Account period: 03/28/2014 – 04/15/2015 | | 1. Disbursements include rent fees in the amount of \$4,456.00. Examples of Trust Distributions that will reduce SSI benefits are housing costs. Housing costs are not a permissible distribution from the Special Needs Trust if they reduce other benefits that the beneficiary could be entitled to. Need to provide justification of paying rent from the Special Needs Trust. | |
| Cont. from 072715 | | Accounting: \$50,365.25 | | 2. Disbursements include a charge in the amount of \$352.00 for "tires for truck" however the property on hand does not list a truck. Need clarification. | |
| | Aff.Sub.Wit. | Beginning POH: \$50,000.00 | | 3. Need Order. | |
| ✓ | Verified | Ending POH: \$34,456.67 | | Note: If the petition is granted, status hearings will be set as follows: | |
| | Inventory | Trustee - not addressed | | • Monday, August 23, 2017 at 9:00 a.m. in Department 303, for the filing of the second account | |
| | PTC | Attorney - \$500.00 | | Reviewed by: LV | |
| | Not.Cred. | Cost fee) - \$200.00 (filing fee) | | Reviewed on: 08/18/2015 | |
| ✓ | Notice of Hrg | Petitioners pray for: | | Updates: | |
| ✓ | Aff.Mail | 1. The First Accounting of this special needs trust be approved. | | Recommendation: | |
| | Aff.Pub. | 2. Court approve court costs. | | File 9 – Kandarian | |
| | Sp.Ntc. | 3. For such other and further orders as the court may deem proper. | | | |
| | Pers.Serv. | | | | |
| | Conf. Screen | | | | |
| | Letters | | | | |
| | Duties/Supp | | | | |
| | Objections | | | | |
| | Video Receipt | | | | |
| | CI Report | | | | |
| | 9202 | | | | |
| | Order | x | | | |
| | Aff. Posting | | | | |
| | Status Rpt | | | | |
| | UCCJEA | | | | |
| | Citation | | | | |
| | FTB Notice | | | | |

Petition for Termination of Guardianship

| | | | |
|------------|---------------|---|---|
| Janessa, 3 | | JACOB SONNY LOPEZ , father, is petitioner. <u>Please see petition for details</u> | NEEDS/PROBLEMS/COMMENTS: 1. Need Notice of Hearing. 2. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> James Lopez (Paternal Grandfather) Katrina Mason (Maternal Grandmother) |
| Jenna, 2 | | | |
| | | | |
| | | | |
| Cont. from | | | |
| | Aff.Sub.Wit. | | |
| ✓ | Verified | | |
| | Inventory | | |
| | PTC | | |
| | Not.Cred. | | |
| | Notice of Hrg | x | |
| | Aff.Mail | x | |
| | Aff.Pub. | | |
| | Sp.Ntc. | | |
| | Pers.Serv. | | |
| | Conf. Screen | | |
| | Letters | | |
| | Duties/Supp | | |
| | Objections | | |
| | Video Receipt | | |
| | CI Report | x | |
| | 9202 | | |
| ✓ | Order | | |
| | Aff. Posting | | |
| | Status Rpt | | |
| | UCCJEA | | |
| | Citation | | |
| | FTB Notice | | |
| | | | Reviewed by: LV |
| | | | Reviewed on: 08/18/2015 |
| | | | Updates: |
| | | | Recommendation: |
| | | | File 10 – Lopez |

| | | | | |
|---|---------------|---|--|---|
| | | | LISA MUNSEY , Daughter and Conservator of the Person and Estate with bond of \$61,581.00, is Petitioner. Account period: 7/24/14 – 6/30/15 Accounting: \$201,182.47 Beginning POH: \$169,745.90 Ending POH: \$171,047.74 (\$7,516.91 cash plus various personal property, vehicles, furniture, jewelry, tools, and an annuity contract) Conservator waives compensation Attorney: \$1,000.00 (less than local rule) Petitioner requests an order allowing and settling the account and report of conservator as filed and authorizing \$1,000.00 for legal services during the account period. | NEEDS/PROBLEMS/COMMENTS: <u>SEE PAGE 2</u> |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | Aff.Sub.Wit. | | | |
| ✓ | Verified | | | |
| ✓ | Inventory | | | |
| | PTC | | | |
| | Not.Cred. | | | |
| ✓ | Notice of Hrg | | | |
| ✓ | Aff.Mail | w | | |
| | Aff.Pub. | | | |
| | Sp.Ntc. | | | |
| | Pers.Serv. | | | |
| | Conf. Screen | | | |
| ✓ | Letters | | | |
| | Duties/Supp | | | |
| | Objections | | | |
| | Video Receipt | | | |
| | CI Report | | | |
| ✓ | 2620(c) | | | |
| ✓ | Order | | | |
| | Aff. Posting | | | |
| | Status Rpt | | | |
| | UCCJEA | | | |
| | Citation | | | |
| | FTB Notice | | | |

| |
|----------------------|
| Reviewed by: skc |
| Reviewed on: 8/19/15 |
| Updates: |
| Recommendation: |
| File 11 – Munsey |

Page 2

NEEDS/PROBLEMS/COMMENTS:

1. Need clarification re Disbursements Schedule items C-3, which reflects payments of \$25/month during the account period for a payment plan on an EECU overdraft protection loan, and C-5, which reflects payments of approx. \$85/month on an EECU visa credit card pursuant to Probate Code §§ 1063(g), 1064(a)(1),(2). These appear to be liabilities incurred prior to the establishment of the conservatorship, but the total liability is unclear, and it is unclear if the Conservator is paying the minimum or has a payoff plan.
2. It appears the conservatee's former residence, valued at \$140,000.00, is being rented for only \$300/month. The Court may require clarification regarding whether the conservatorship estate is receiving fair market value for the property, given that the estate's expenses slightly exceeded receipts during the account period, requiring family members to contribute funds.
3. Need clarification regarding the mandatory draw taken on the annuity contract pursuant to Probate Code §1064(a)(1). Was this a one-time withdrawal or is this expected to occur on an ongoing or more frequent basis?
4. Conservator's current bond of \$61,581.00 appears to be insufficient. Based on the value of the conservatee's assets, less the real property, plus annual income, plus cost of recovery, Examiner calculates that bond should be increased to at least \$100,716.12 (an increase of \$39,135.12) pursuant to Probate Code §2320(c)(4) and Cal. Rule of Court 7.207.

Note: If granted, the Court will set a status hearing for the filing of the Second Account as follows:

- If a one-year account is required, Monday, August 29, 2016
- If a two-year account is required, Monday, August 28, 2017

If the proper items are on file prior to the status hearing date pursuant to Local Rule 7.5, the status hearing will come off calendar.

Notice of Motion and Motion to Be Relieved as Counsel

| | | | |
|-----------------------------|----------------------|--------------------------|---|
| Age: | | | NEEDS/PROBLEMS/COMMENTS: <div style="text-align: center;"><u>OFF CALENDAR</u></div> Request for Dismissal entered 8/14/15 |
| DOD: | | | |
| | | | |
| | | | |
| Cont. from | | | |
| <input type="checkbox"/> | Aff.Sub.Wit. | <input type="checkbox"/> | |
| <input type="checkbox"/> | Verified | <input type="checkbox"/> | |
| <input type="checkbox"/> | Inventory | <input type="checkbox"/> | |
| <input type="checkbox"/> | PTC | <input type="checkbox"/> | |
| <input type="checkbox"/> | Not.Cred. | <input type="checkbox"/> | |
| <input type="checkbox"/> | Notice of Hrg | <input type="checkbox"/> | |
| <input type="checkbox"/> | Aff.Mail | <input type="checkbox"/> | |
| <input type="checkbox"/> | Aff.Pub. | <input type="checkbox"/> | |
| <input type="checkbox"/> | Sp.Ntc. | <input type="checkbox"/> | |
| <input type="checkbox"/> | Pers.Serv. | <input type="checkbox"/> | |
| <input type="checkbox"/> | Conf. Screen | <input type="checkbox"/> | |
| <input type="checkbox"/> | Letters | <input type="checkbox"/> | |
| <input type="checkbox"/> | Duties/Supp | <input type="checkbox"/> | |
| <input type="checkbox"/> | Objections | <input type="checkbox"/> | |
| <input type="checkbox"/> | Video Receipt | <input type="checkbox"/> | |
| <input type="checkbox"/> | CI Report | <input type="checkbox"/> | |
| <input type="checkbox"/> | 9202 | <input type="checkbox"/> | |
| <input type="checkbox"/> | Order | <input type="checkbox"/> | |
| <input type="checkbox"/> | Aff. Posting | <input type="checkbox"/> | |
| <input type="checkbox"/> | Status Rpt | <input type="checkbox"/> | |
| <input type="checkbox"/> | UCCJEA | <input type="checkbox"/> | |
| <input type="checkbox"/> | Citation | <input type="checkbox"/> | |
| <input type="checkbox"/> | FTB Notice | <input type="checkbox"/> | |
| Reviewed by: skc | | | |
| Reviewed on: 8/14/15 | | | |
| Updates: | | | |
| Recommendation: | | | |
| File 12 – Ratliff | | | |

Notice of Motion and Motion to Be Relieved as Counsel

| | | | |
|-----------------------------|----------------------|--------------------------|---|
| Age: | | | NEEDS/PROBLEMS/COMMENTS: <div style="text-align: center;"><u>OFF CALENDAR</u></div> Request for Dismissal entered 8/14/15 |
| DOD: | | | |
| | | | |
| | | | |
| Cont. from | | | |
| <input type="checkbox"/> | Aff.Sub.Wit. | <input type="checkbox"/> | |
| <input type="checkbox"/> | Verified | <input type="checkbox"/> | |
| <input type="checkbox"/> | Inventory | <input type="checkbox"/> | |
| <input type="checkbox"/> | PTC | <input type="checkbox"/> | |
| <input type="checkbox"/> | Not.Cred. | <input type="checkbox"/> | |
| <input type="checkbox"/> | Notice of Hrg | <input type="checkbox"/> | |
| <input type="checkbox"/> | Aff.Mail | <input type="checkbox"/> | |
| <input type="checkbox"/> | Aff.Pub. | <input type="checkbox"/> | |
| <input type="checkbox"/> | Sp.Ntc. | <input type="checkbox"/> | |
| <input type="checkbox"/> | Pers.Serv. | <input type="checkbox"/> | |
| <input type="checkbox"/> | Conf. Screen | <input type="checkbox"/> | |
| <input type="checkbox"/> | Letters | <input type="checkbox"/> | |
| <input type="checkbox"/> | Duties/Supp | <input type="checkbox"/> | |
| <input type="checkbox"/> | Objections | <input type="checkbox"/> | |
| <input type="checkbox"/> | Video Receipt | <input type="checkbox"/> | |
| <input type="checkbox"/> | CI Report | <input type="checkbox"/> | |
| <input type="checkbox"/> | 9202 | <input type="checkbox"/> | |
| <input type="checkbox"/> | Order | <input type="checkbox"/> | |
| <input type="checkbox"/> | Aff. Posting | <input type="checkbox"/> | |
| <input type="checkbox"/> | Status Rpt | <input type="checkbox"/> | |
| <input type="checkbox"/> | UCCJEA | <input type="checkbox"/> | |
| <input type="checkbox"/> | Citation | <input type="checkbox"/> | |
| <input type="checkbox"/> | FTB Notice | <input type="checkbox"/> | |
| Reviewed by: skc | | | |
| Reviewed on: 8/14/15 | | | |
| Updates: | | | |
| Recommendation: | | | |
| File 13 – Ratliff | | | |

First and Final Report of Executor on Waiver of Account and Petition for Allowance of Compensation to Attorney for Ordinary Services, and for Final Distribution

| | | | | |
|---------------------|----------------------|---|---|---|
| DOD:12/28/14 | | <p>CAROL TERRELL, Daughter And Executor with Full IAEA without bond, is Petitioner.</p> <p>Accounting is waived.</p> <p>I&A: \$275,000.00 POH: \$249,415.93 (cash)</p> <p>Executor waives compensation.</p> <p>Attorney (Statutory): \$8,500.00</p> <p>Costs: \$435.00</p> <p>Distribution pursuant to Decedent's will:</p> <p>Carol Terrell: \$240,480.93</p> | <p>NEEDS/PROBLEMS/COMMENTS:</p> | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | Aff.Sub.Wit. | | | |
| ✓ | Verified | | | |
| ✓ | Inventory | | | |
| ✓ | PTC | | | |
| ✓ | Not.Cred. | | | |
| ✓ | Notice of Hrg | | | |
| ✓ | Aff.Mail | | | W |
| | Aff.Pub. | | | |
| | Sp.Ntc. | | | |
| | Pers.Serv. | | | |
| | Conf. Screen | | | |
| ✓ | Letters | | | |
| | Duties/Supp | | | |
| | Objections | | | |
| | Video Receipt | | | |
| | CI Report | | | |
| ✓ | 9202 | | | |
| ✓ | Order | | | |
| | Aff. Posting | | | |
| | Status Rpt | | | |
| | UCCJEA | | | |
| | Citation | | | |
| ✓ | FTB Notice | | | |
| | | | <p>Reviewed by: skc</p> <p>Reviewed on: 8/19/15</p> <p>Updates:</p> <p>Recommendation: SUBMITTED</p> <p>File 14 – Pinner</p> | |

Attorney Boyajian, Thomas M. (for Petitioner Jo Anne M. Ling, Executor)

Report of Sale and Petition for Order Confirming Sale of RP

| | | | |
|--|---|--|--|
| DOD: 12/20/2014 | JO ANNE M. LING , daughter and Executor appointed on 3/11/2015 with Full IAEA authority without bond, is Petitioner. | | NEEDS/PROBLEMS/COMMENTS: |
| | Sale Price - \$339,000.00 Overbid - \$356,450.00 | | |
| Cont. from | Appraisal - \$310,000.00 (completed 7/7/2015) | | 1. Need mandatory-use Judicial Council form MC-050, <i>Substitution of Attorney</i> , signed by Attorney MELVIN K. RUBE to be filed with the Court. |
| <input checked="" type="checkbox"/> Aff.Sub.Wit. | Property - 8236 Yearling Way Jurupa Valley*, CA (*property address is actually Riverside, CA, in legal description; Jurupa Valley became municipality in 2011 and deed will reflect Jurupa Valley at title change;) | | |
| <input checked="" type="checkbox"/> Verified | Publication - Business Journal | | 2. Need proof of 15 days' mailed service of the <i>Notice of Hearing</i> with a copy of the <i>Petition</i> for WELLS FARGO BANK , per the <i>Request for Special Notice</i> filed 7/13/2015 pursuant to Probate Code §§ 10308(c), 1220(a)(2)(B), 1250 and 1252(a). |
| <input checked="" type="checkbox"/> Inventory | Buyers - Isidro Juarez and Gabriela Juarez, as husband and wife, [as community prop.] | | |
| <input type="checkbox"/> PTC | Broker - \$16,950.00 (5% payable 2.5% to Keller-Williams Norco @ \$8,475.00 and 2.5% to Keller-Williams Riverside @ \$8,475.00;) | | Note: Affidavit of Posting was not completed pursuant to Probate Code § 10308(c). However, Probate Code § 10503 makes clear that sales under independent administration authority are not subject to the statutory requirements that apply to the Court confirmation of a real property sale; thus, the posting of the notice of sale by the Court Clerk is not required when, as here, a sale is made under full IAEA authority. It is unclear whether there exists justification for the filing of this report of sale and petition for confirmation of sale, as the <i>Petition</i> is silent regarding reasons that court-confirmation is sought by Petitioner. |
| <input type="checkbox"/> Not.Cred. | Bond - No bond has been posted and no additional bond is needed. | | |
| <input checked="" type="checkbox"/> Notice of Hrg | | | |
| <input checked="" type="checkbox"/> Aff.Mail | w / o | | |
| <input checked="" type="checkbox"/> Aff.Pub. | | | |
| <input type="checkbox"/> Sp.Ntc. | | | |
| <input type="checkbox"/> Pers.Serv. | | | |
| <input type="checkbox"/> Conf. Screen | | | |
| <input type="checkbox"/> Letters | 031315 | | |
| <input type="checkbox"/> Duties/Supp | | | |
| <input type="checkbox"/> Objections | | | |
| <input type="checkbox"/> Video Receipt | | | |
| <input type="checkbox"/> CI Report | | | |
| <input type="checkbox"/> 9202 | | | |
| <input checked="" type="checkbox"/> Order | | | |
| <input type="checkbox"/> Aff. Posting | X | | |
| <input type="checkbox"/> Status Rpt | | | |
| <input type="checkbox"/> UCCJEA | | | |
| <input type="checkbox"/> Citation | | | |
| <input type="checkbox"/> FTB Notice | | | |
| | | | Reviewed by: LEG |
| | | | Reviewed on: 8/19/15 |
| | | | Updates: |
| | | | Recommendation: |
| | | | File 15 – Cambio |

Petitioner Kenneth Eugene Barger (Pro Per Petitioner, son)

Petition for Probate of Will and for Letters Testamentary

| | | |
|---|---|---|
| DOD: 4/9/2015 | KENNETH RALPH BARGER , son and named Executor without bond, is Petitioner. | NEEDS/PROBLEMS/COMMENTS: |
| | | Continued from 7/27/2015. Minute Order states examiner notes provided in open court. |
| Cont. from 060815, 071315, 072715 | Full IAEA: OK | Note for background: Minute Order dated 6/8/2015 states examiner notes are handed to Mr. Barger in open court. Mr. Barger is admonished not to sell any property before the Court approves the petition. |
| <input type="checkbox"/> Aff.Sub.Wit. | Will Dated: 3/25/2015 | |
| <input checked="" type="checkbox"/> Verified | | |
| <input type="checkbox"/> Inventory | Residence: Fresno | |
| <input type="checkbox"/> PTC | Publication: Business Journal | |
| <input type="checkbox"/> Not.Cred. | | |
| <input type="checkbox"/> Notice of Hrg | | 1. It appears based upon the <i>Proof of Service of Notice of Hearing</i> filed 8/12/2015 in response to the previously raised issue that the Decedent's predeceased children, namely WILLIAM EUGENE BARGER , adopted son (DOD 6/25/1991), and JOHN THOMAS BARGER , adopted son (DOD 10/10/2012), had children who survived the Decedent. Need declaration in support of the <i>Petition for Probate</i> to be filed with the Court containing the names, relationships to Decedent, and ages of the following persons: |
| <input type="checkbox"/> Aff.Mail | | <ul style="list-style-type: none"> • CHRIS BARGER; • JESSY BARGER; • CODY BARGER; • JODY BARGER ANDERSON; • BILLY BARGER. |
| <input checked="" type="checkbox"/> Aff.Pub. | Estimated value of the Estate: | |
| <input type="checkbox"/> Sp.Ntc. | Real property - \$300,000.00 | |
| <input type="checkbox"/> Pers.Serv. | Personal property - \$ 500.00 | |
| <input type="checkbox"/> Conf. Screen | Total - \$300,500.00 | |
| <input checked="" type="checkbox"/> Letters | Probate Referee: Rick Smith | |
| <input checked="" type="checkbox"/> Duties/Supp | | |
| <input type="checkbox"/> Objections | | |
| <input type="checkbox"/> Video Receipt | | |
| <input type="checkbox"/> CI Report | | |
| <input type="checkbox"/> 9202 | | |
| <input checked="" type="checkbox"/> Order | | |
| <input type="checkbox"/> Aff. Posting | | ~Please see additional page~ |
| <input type="checkbox"/> Status Rpt | | Reviewed by: LEG |
| <input type="checkbox"/> UCCJEA | | Reviewed on: 8/18/15 |
| <input type="checkbox"/> Citation | | Updates: |
| <input type="checkbox"/> FTB Notice | | Recommendation: |
| | | File 17 – Barger |

Note: If *Petition* is granted, Court will set Status Hearings as follows:

- **Thursday, January 28, 2016 at 9:00 a.m. in Dept. 303** for the filing of final inventory and appraisal; and
- **Thursday, October 27, 2016 at 9:00 a.m. in Dept. 303** for the filing of first account and/or petition for final distribution.

Pursuant Local Rule 7.5, if the documents noted above are filed 10 days prior to the dates listed, the hearings will be taken off calendar and no appearance will be required.

| | | | | |
|-------------------------------------|---------------|--|--|---|
| Age: 16 | | TEMPORARY EXPIRES 08/24/2015 | NEEDS/PROBLEMS/COMMENTS: | |
| | | | | |
| | | MARIA LOPEZ , maternal aunt, is petitioner. | Minute Order of 07/27/2015: Ms. Lopez is assisted in the Spanish language by her daughter. Examiner notes provided in open court. The Court dispenses with notice as to Cesar Ventura, father; Petitioner just needs to have Rebecca Michel, maternal grandmother, properly served. The Court order temporary orders/letters issue forthwith. | |
| | | | | |
| Cont. from 072715 | | <u>Please see petition for details</u> | 1. Need Notice of Hearing. | |
| <input type="checkbox"/> | Aff.Sub.Wit. | | | |
| <input checked="" type="checkbox"/> | Verified | | 2. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> • Rebecca Michel (Maternal Grandmother) | |
| <input type="checkbox"/> | Inventory | | | |
| <input type="checkbox"/> | PTC | | | |
| <input type="checkbox"/> | Not.Cred. | | | |
| <input type="checkbox"/> | Notice of Hrg | | | x |
| <input type="checkbox"/> | Aff.Mail | | | x |
| <input type="checkbox"/> | Aff.Pub. | | | |
| <input type="checkbox"/> | Sp.Ntc. | | | |
| <input type="checkbox"/> | Pers.Serv. | | | x |
| <input checked="" type="checkbox"/> | Conf. Screen | | | |
| <input checked="" type="checkbox"/> | Letters | | | |
| <input checked="" type="checkbox"/> | Duties/Supp | | | |
| <input type="checkbox"/> | Objections | | | |
| <input type="checkbox"/> | Video Receipt | | | |
| <input checked="" type="checkbox"/> | CI Report | | | |
| <input type="checkbox"/> | 9202 | | | |
| <input checked="" type="checkbox"/> | Order | | | |
| <input type="checkbox"/> | Aff. Posting | | | |
| <input type="checkbox"/> | Status Rpt | | | |
| <input checked="" type="checkbox"/> | UCCJEA | | | |
| <input type="checkbox"/> | Citation | | | |
| <input type="checkbox"/> | FTB Notice | | | |
| | | | Reviewed by: LV | |
| | | | Reviewed on: 08/18/2015 | |
| | | | Updates: | |
| | | | Recommendation: | |
| | | | File 18 – Lopez | |

Petitioner Mejia, Malaquias (Pro Per – Paternal Grandfather – Petitioner)

Petitioner Mejia, Yolanda (Pro Per – Paternal Grandmother – Petitioner)

Petition to Appoint Guardian of the Person (Prob. Code §1510)

| | | | |
|---------------------------|--|--|---|
| See petition for details. | | | NEEDS/PROBLEMS/COMMENTS: |
| | | | 1. Need Notice of Hearing. |
| | | | 2. Need proof of personal service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on: |
| | | | - Anastasia Samantha Garcia (Mother) |
| | | | 3. Need proof of service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing per Probate Code §1511 <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on: |
| | | | - David Garcia (Maternal Grandfather) |
| | | | - Vicky Garcia (Maternal Grandmother) |
| | | | - Siblings age 12 or older |
| | | | Reviewed by: skc |
| | | | Reviewed on: 8/19/15 |
| | | | Updates: |
| | | | Recommendation: |
| | | | File 20 – Garcia |

| | | |
|---|---------------|---|
| | Aff.Sub.Wit. | |
| ✓ | Verified | |
| | Inventory | |
| | PTC | |
| | Not.Cred. | |
| | Notice of Hrg | X |
| | Aff.Mail | X |
| | Aff.Pub. | |
| | Sp.Ntc. | |
| | Pers.Serv. | X |
| ✓ | Conf. Screen | |
| ✓ | Letters | |
| ✓ | Duties/Supp | |
| | Objections | |
| | Video Receipt | |
| ✓ | CI Report | |
| ✓ | Clearances | |
| ✓ | Order | |
| | Aff. Posting | |
| | Status Rpt | |
| ✓ | UCCJEA | |
| | Citation | |
| | FTB Notice | |

| | | | | |
|-------------------------------------|----------------------|--|---|-----|
| DOD: 5/29/15 | | AMY BADILLA , Daughter and named Executor without bond, is Petitioner. Full IAEA – ok Will dated 3/10/15 Residence: Fresno Publication: Business Journal Estimated value of estate: Personal property: \$ 500.00 Real property: \$170,300.00 Total: \$170,800.00 Probate Referee: Rick Smith | NEEDS/PROBLEMS/COMMENTS: <u>Note:</u> The Court will set status hearings as follows: <ul style="list-style-type: none"> Monday, January 25, 2016 for the filing of the Inventory and Appraisal Monday, October 24, 2016 for the filing of the first account or petition for final distribution. If the proper items are on file pursuant to Local Rule 7.5, the status hearings may come off calendar. | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| <input type="checkbox"/> | Aff.Sub.Wit. | | | S/P |
| <input checked="" type="checkbox"/> | Verified | | | |
| <input type="checkbox"/> | Inventory | | | |
| <input type="checkbox"/> | PTC | | | |
| <input type="checkbox"/> | Not.Cred. | | | |
| <input checked="" type="checkbox"/> | Notice of Hrg | | | |
| <input checked="" type="checkbox"/> | Aff.Mail | W | | |
| <input checked="" type="checkbox"/> | Aff.Pub. | | | |
| <input type="checkbox"/> | Sp.Ntc. | | | |
| <input type="checkbox"/> | Pers.Serv. | | | |
| <input type="checkbox"/> | Conf. Screen | | | |
| <input checked="" type="checkbox"/> | Letters | | | |
| <input checked="" type="checkbox"/> | Duties/Supp | | | |
| <input type="checkbox"/> | Objections | | | |
| <input type="checkbox"/> | Video Receipt | | | |
| <input type="checkbox"/> | CI Report | | | |
| <input type="checkbox"/> | 9202 | | | |
| <input checked="" type="checkbox"/> | Order | | | |
| <input type="checkbox"/> | Aff. Posting | | | |
| <input type="checkbox"/> | Status Rpt | | | |
| <input type="checkbox"/> | UCCJEA | | | |
| <input type="checkbox"/> | Citation | | | |
| <input type="checkbox"/> | FTB Notice | | | |
| | | | Reviewed by: skc Reviewed on: 8/19/15 Updates: Recommendation: SUBMITTED File 22 – MacIsaac | |

Petitioner

Gonzalez, Juan Arellano (pro per – maternal grandfather/Petitioner)

Petitioner

Gonzalez, Maria G. (pro per – maternal grandmother/Petitioner)

Petition for Appointment of Temporary Guardian of the Person

| | | | |
|--|---|--|--|
| Age: 5 | <u>TEMPORARY EXPIRES 08/24/15</u> | | NEEDS/PROBLEMS/COMMENTS: |
| | <u>GENERAL HEARING: 09/28/15</u> | | |
| | JUAN ARELLANO GONZALEZ and MARIA G. GONZALEZ , maternal grandparents, are Petitioners. | | <u>CONTINUED FROM 08/10/15</u> Minute Order from 08/10/15 states: The Court grants the petition to preserve the status quo; Joel Leon Jacobo, father, must be mailed notice in Mexico and must also be sent a text message regarding these proceedings. |
| Cont. from 081015 | Father: JOEL LEON JACOBO | | |
| <input type="checkbox"/> Aff.Sub.Wit. | Mother: ARIANA GONZALEZ – deceased | | Petitioners are Spanish speaking. |
| <input checked="" type="checkbox"/> Verified | Paternal grandfather: JUAN LEON | | |
| <input type="checkbox"/> Inventory | Paternal grandmother: BERTHA JACOBO | | 1. Need <i>Notice of Hearing</i> for Temporary Guardianship hearing. |
| <input type="checkbox"/> PTC | Petitioners state [see Petition for details]. | | |
| <input type="checkbox"/> Not.Cred. | | | 2. Need proof of personal service at least 5 court days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Temporary Guardian of the Person</i> <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for: a. Joel Leon Jacobo (father) |
| <input type="checkbox"/> Notice of Hrg | x | | |
| <input type="checkbox"/> Aff.Mail | | | Reviewed by: JF |
| <input type="checkbox"/> Aff.Pub. | | | |
| <input type="checkbox"/> Sp.Ntc. | | | Reviewed on: 08/18/15 |
| <input type="checkbox"/> Pers.Serv. | x | | |
| <input checked="" type="checkbox"/> Conf. Screen | | | Updates: |
| <input checked="" type="checkbox"/> Letters | | | |
| <input checked="" type="checkbox"/> Duties/Supp | | | Recommendation: |
| <input type="checkbox"/> Objections | | | |
| <input type="checkbox"/> Video Receipt | | | File 23 – Leon |
| <input type="checkbox"/> CI Report | | | |
| <input type="checkbox"/> 9202 | | | |
| <input checked="" type="checkbox"/> Order | | | |
| <input type="checkbox"/> Aff. Posting | | | |
| <input type="checkbox"/> Status Rpt | | | |
| <input checked="" type="checkbox"/> UCCJEA | | | |
| <input type="checkbox"/> Citation | | | |
| <input type="checkbox"/> FTB Notice | | | |